

## AMENDMENTS TO THE CLAIMS

This listing of claims will replace all prior versions and listings of claims in the application.

### **Listings of Claims:**

1. (Currently Amended) A computer implemented method of providing a disciplined approach for conducting business management activities operating on one or more computer processors, the computer processors in communication with a host system computer over a communication network, the method comprising:

developing an activity list of tasks and behaviors that relate to an identified opportunity;

performing a time study of observable behaviors associated with the activity;

collecting, on the computer processors, data resulting from the time study and from performance of work activities;

identifying issues presented as a result of analyzing;

generating and implementing a roadmap for resolving the issues;

training individuals affected by the roadmap in accordance with action items contained in the roadmap; and

forecasting, on the computer processors, future resource requirements based upon reports generated as a result of the collecting data, and identifying issues, and training individuals, wherein the future resource requirements are forecasted using the training by comparing actual progress made by individuals to planned progress for the individuals, the planned progress derived in response to a training assessment;

wherein generating a roadmap includes ranking individuals amongst one another based upon observable behaviors conducted as observed in an initial screening to identify training requirements and creating an action plan and, wherein further, training the individuals includes linking a corresponding training program with the individuals in response to the initial screening, the action plan including detailed action items and metrics that guide the individuals through the roadmap.

2. (Original) The method of claim 1, further comprising updating a database of roadmaps based upon notification of a compliance resulting from an activity assessment.

3. (Previously Presented) The method of claim 1, wherein developing an activity list includes:

establishing goals and strategies for exploiting the opportunity;

documenting the goals and strategies; and

communicating the goals and strategies to affected individuals.

4. (Previously Presented) The method of claim 3, further comprising using information in the activity list to develop an activity detail summary comprising:

documenting current workflow conditions and requirements;

identifying key volume indicators;

identifying activities and creating an activity list summary; and

identifying key measurement indicators.

5. (Previously Presented) The method of claim 4, wherein the key volume indicators are derived by:

comparing like work units and validating differences between processes used in the like work units; and

establishing engineering service metrics and reasonable expectations resulting from the comparing like work units;

wherein the engineering service metrics include best demonstrated practices for activities conducted in the work units; and

wherein the key measurement indicators measure performance, service, quality, and effectiveness of work performed and quantify results into relevant measurements.

6. (Previously Presented) The method of claim 1, wherein training the individuals further includes:

evaluating the individuals to determine current skill levels and skills flexibility, the skills flexibility identifying relative strengths and weaknesses within a team of individuals from a training standpoint; and

conducting a pre-training assessment to calibrate the skills of the individuals prior to training, and conducting a post-training assessment to measure the skills retained by the individuals after conducting the training;

wherein the pre-training assessment and the post-training assessment assess skills training needs for three skill areas, including:

basic skills that define basic foundational elements needed to perform a job;

fundamental skills that define an advanced set of skills desirable for optimally performing a job; and

advanced skill areas that define unique or special skills required to perform a job.

7. (Previously Presented) The method of claim 1, wherein performing a time study of observable behaviors further includes:

- identifying behaviors to observe;
- observing the behaviors;
- determining statistical validity of observations;
- defining metrics for the behaviors;
- documenting the observations; and
- identifying issues resulting from the observations.

8. (Previously presented) The method of claim 1, wherein the collecting resulting from performance of work activities includes:

- generating a tally sheet of detailed work volumes;
- generating a daily load review, the daily load review comprising the calculation of the work volume to be completed and an amount of labor to produce the work volume;
- creating a daily schedule control using the tally sheet and the daily load review, the daily schedule control including:
  - productivity data;
  - percentage of overtime data;
  - earned hours; and
  - lost time;
- conducting a daily employee performance review including:

meeting with employees to review prior day performance;

gathering lessons learned;

applying lessons learned to future operations; and

generating a daily planner including:

gathering the results of the daily load review;

gathering the results of the daily schedule control; and

gathering the results of the daily performance review.

9. (Currently amended) A storage medium encoded with machine-readable computer program code for providing a disciplined approach for conducting business management activities, the storage medium including instructions for causing a server to implement a method, comprising:

developing an activity list of tasks and behaviors that relate to an identified opportunity;

performing a time study of observable behaviors associated with the activity;

collecting data resulting from the time study and from performance of work activities;

identifying issues presented as a result of analyzing;

generating and implementing a roadmap for resolving the issues;

training individuals affected by the roadmap in accordance with action items contained in the roadmap; and

forecasting future resource requirements based upon reports generated as a result of the collecting data, and identifying issues, and training individuals, wherein the future

resource requirements are forecasted using the training by comparing actual progress made by individuals to planned progress for the individuals, the planned progress derived in response to a training assessment;

wherein generating a roadmap includes ranking individuals amongst one another based upon observable behaviors conducted as observed in an initial screening to identify training requirements and creating an action plan and, wherein further, training the individuals includes linking a corresponding training program with the individuals in response to the initial screening, the action plan including detailed action items and metrics that guide the individuals through the roadmap.

10. (Previously Presented) The storage medium of claim 9, further comprising instructions for causing the server to implement:

updating a database of roadmaps based upon notification of a compliance resulting from an activity assessment.

11. (Previously Presented) The storage medium of claim 9, wherein developing an activity list includes:

establishing goals and strategies for exploiting the opportunity;

documenting the goals and strategies; and

communicating the goals and strategies to affected individuals.

12. (Previously Presented) The storage medium of claim 11, further comprising instructions for causing the server to implement:

using information in the activity list to develop an activity detail summary comprising:

documenting current workflow conditions and requirements;

identifying key volume indicators;

identifying activities and creating an activity list summary; and

identifying key measurement indicators.

13. (Previously Presented) The storage medium of claim 12, wherein the key volume indicators are derived by:

comparing like work units and validating differences between processes used in the like work units; and

establishing engineering service metrics and reasonable expectations resulting from the comparing like work units;

wherein the engineering service metrics include best demonstrated practices for activities conducted in the work units; and

wherein the key measurement indicators measure performance, service, quality, and effectiveness of work performed and quantify results into relevant measurements.

14. (Previously Presented) The storage medium of claim 9, wherein training the individuals further includes:

evaluating the individuals to determine current skill levels and skills flexibility, the skills flexibility identifying relative strengths and weaknesses within a team of individuals from a training standpoint; and

conducting a pre-training assessment to calibrate the skills of the individuals prior to training, and conducting a post-training assessment to measure the skills retained by the individuals after conducting the training;

wherein the pre-training assessment and the post-training assessment assess skills training needs for three skill areas, including:

basic skills that define basic foundational elements needed to perform a job;

fundamental skills that define an advanced set of skills desirable for optimally performing a job; and

advanced skill areas that define unique or special skills required to perform a job.

15. (Previously Presented) The storage medium of claim 9, wherein the performing a time study of observable behaviors further includes:

identifying behaviors to observe;

observing the behaviors;

determining statistical validity of observations;

defining metrics for the behaviors;

documenting the observations; and

identifying issues resulting from the observations.

16. (Previously presented) The storage medium of claim 9, wherein the collecting resulting from performance of work activities includes:

generating a tally sheet of detailed work volumes;

generating a daily load review, the daily load review comprising the calculation of the work volume to be completed and an amount of labor to produce the work volume;

creating a daily schedule control using the tally sheet and the daily load review, the daily schedule control including:

productivity data;

percentage of overtime data;

earned hours; and

lost time;

conducting a daily employee performance review including:

meeting with employees to review prior day performance;

gathering lessons learned;

applying lessons learned to future operations; and

generating a daily planner including:

gathering the results of the daily load review;

gathering the results of the daily schedule control; and

gathering the results of the daily performance review.

17. (Currently amended) A system for providing a disciplined approach for conducting business management activities, comprising:

a server;

a business management system executing on the server, the business management system implementing a method, comprising:

developing an activity list of tasks and behaviors that relate to an identified opportunity;

performing a time study of observable behaviors associated with the activity;

collecting data resulting from the time study and from performance of work activities;

identifying issues presented as a result of analyzing;

generating and implementing a roadmap for resolving the issues;

training individuals affected by the roadmap in accordance with action items contained in the roadmap; and

forecasting future resource requirements based upon reports generated as a result of the collecting data, and identifying issues, and training individuals, wherein the future resource requirements are forecasted using the training by comparing actual progress made by individuals to planned progress for the individuals, the planned progress derived in response to a training assessment;

wherein generating a roadmap includes ranking individuals amongst one another based upon observable behaviors conducted as observed in an initial screening to identify training requirements and creating an action plan and, wherein further, training the individuals includes linking a corresponding training program with the individuals in response to the initial screening, the action plan including detailed action items and metrics that guide the individuals through the roadmap.

18. (Previously Presented) The system of claim 17, wherein developing an activity list includes:

establishing goals and strategies for exploiting the opportunity;

documenting the goals and strategies; and

communicating the goals and strategies to affected individuals, the method further comprising:

using information in the activity list to develop an activity detail summary comprising:

documenting current workflow conditions and requirements;

identifying key volume indicators;

identifying activities and creating an activity list summary; and

identifying key measurement indicators.

19. (Previously Presented) The system of claim 18, wherein the key volume indicators are derived by:

comparing like work units and validating differences between processes used in the like work units; and

establishing engineering service metrics and reasonable expectations resulting from the comparing like work units;

wherein the engineering service metrics include best demonstrated practices for activities conducted in the work units; and

wherein the key measurement indicators measure performance, service, quality, and effectiveness of work performed and quantify results into relevant measurements.

20. (Previously Presented) The system of claim 17, wherein training the individuals further includes:

evaluating the individuals to determine current skill levels and skills flexibility, the skills flexibility identifying relative strengths and weaknesses within a team of individuals from a training standpoint; and

conducting a pre-training assessment to calibrate the skills of the individuals prior to training, and conducting a post-training assessment to measure the skills retained by the individuals after conducting the training;

wherein the pre-training assessment and the post-training assessment assess skills training needs for three skill areas, including:

basic skills that define basic foundational elements needed to perform a job;

fundamental skills that define an advanced set of skills desirable for optimally performing a job; and

advanced skill areas that define unique or special skills required to perform a job.

21. (Previously Presented) The method of claim 5, wherein the observable behaviors are percentage of telephone calls answered within an average speed, the average speed determined by the key measurement indicators.

22. (Currently Amended) The system of claim 12 wherein the observable behaviors are a number of repeat calls on the same issue, the method further comprising:

determining the percentage of change in the number of repeat calls over time, for a work area by comparing the number of calls on the same issue with the key measurement indicators, the work area including a plurality of workers in order to determine the percentage of change in the number of repeat calls over time.

23. (Currently Amended) The storage medium of claim 18 wherein the observable behaviors are a measurement of the speed in which a customer call is answered, the method further comprising:

determine the percentage of change in the speed in which a customer call is answered over time, for a work area, by comparing the measurement of the speed in which a customer call is answered with the key measurement indicators in order to, the work area including a plurality of workers, determine the percentage of change in the speed in which a customer call is answered over time.